



ORTHODOX PARISH LEADERSHIP



Capital Campaigns Planned Giving Stewardship & Generosity

Monday, July 15th 2024

Tonight's Presenters

Capital Campaigns



Steve
Tibbs

Planned Giving



Melpomeni
Murdakes

Stewardship & Generosity



Kristina
Mehas



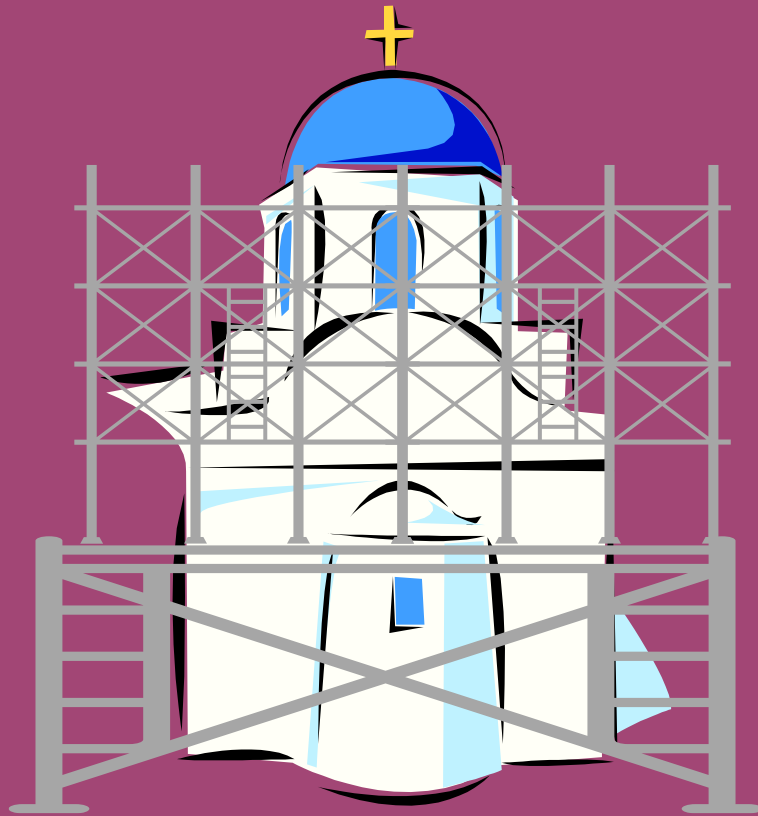
The Capital Campaign

“O Lord our God, as for all this abundance that we have provided for building you a temple for your holy name, it comes from your hand, and all of it belongs to you.”

1 Chronicles 29:16



The Capital Campaign



Significant...

New Construction

Renovation

Relocation

Major Maintenance / Repairs

Asset Acquisition

Debt Reduction

The Capital Campaign

WHY

a well-constructed approach and plan is vital to support significant development efforts

WHAT

elements will best position your campaign for success

HOW

we can help

The Capital Campaign

Key Lessons

Faith and Trust in God

Vision Over Money

Spiritual, Not Transactional, Opportunity

Widow's Mite - Luke 21:1-4

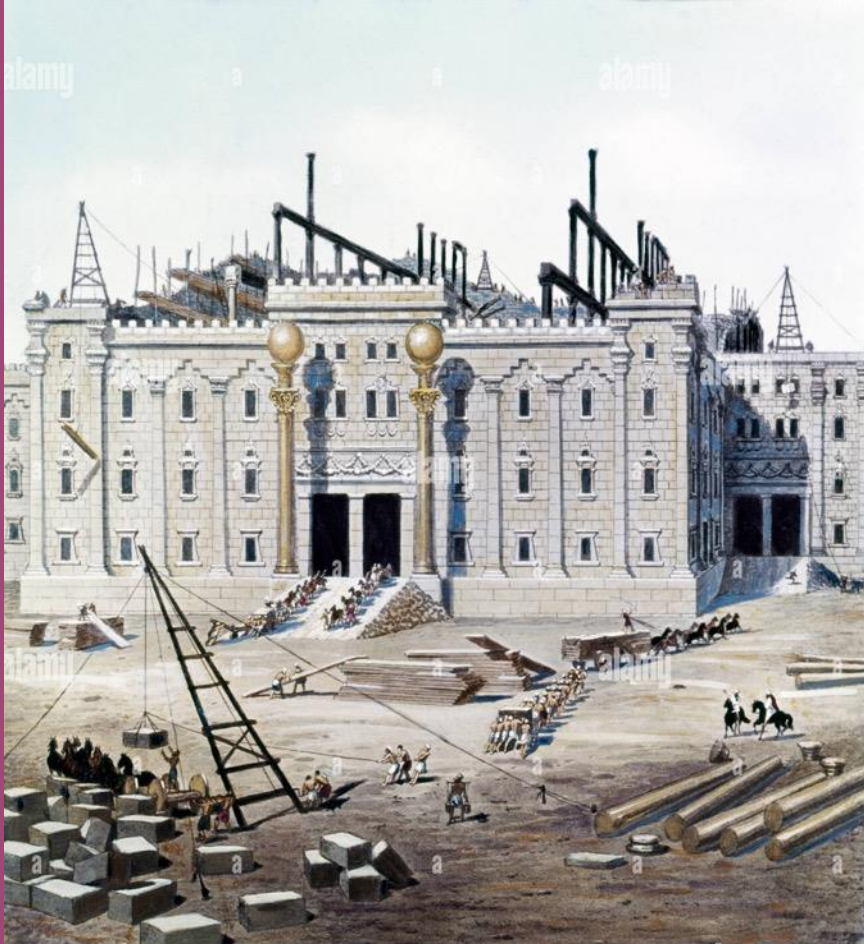


Program Excellence = Confidence = Trust

Incredible Journey of Connection

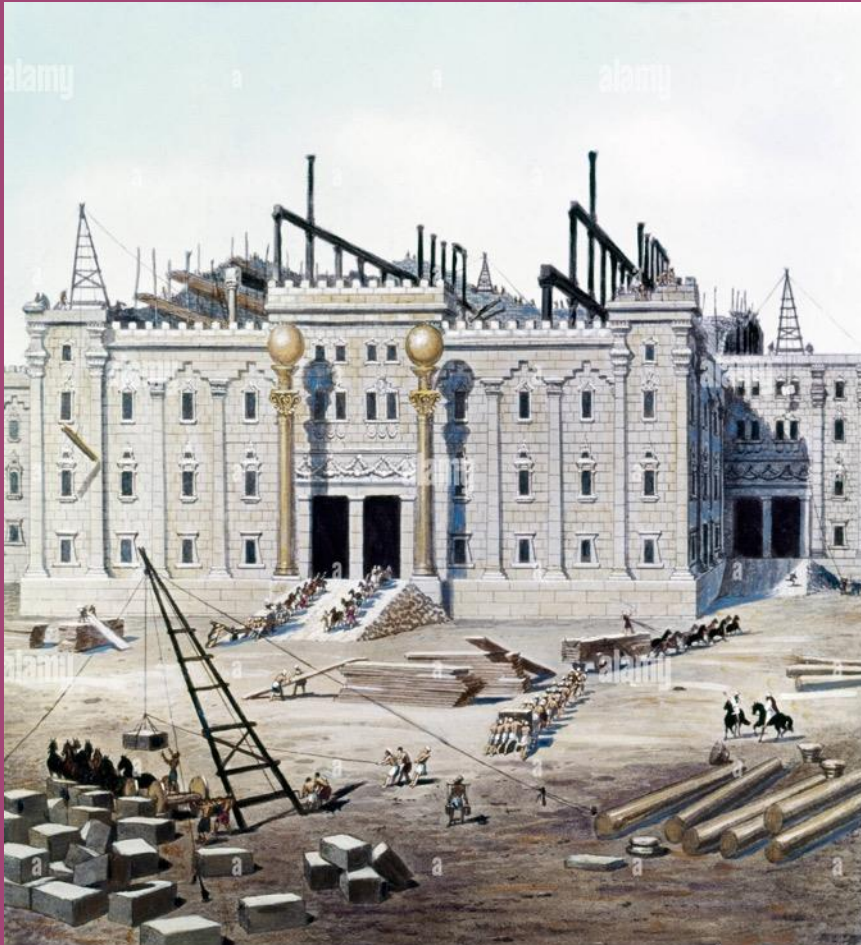
Non-Stop Communication

Takes Longer Than You Think

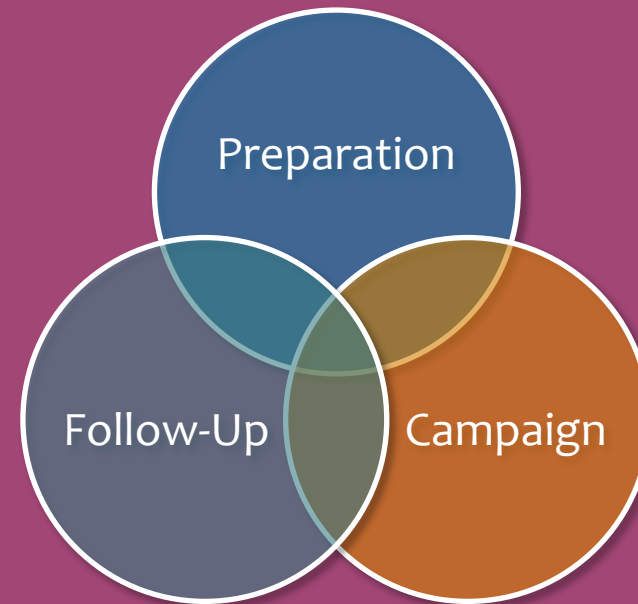


The Framework

Building of Solomon's Temple



3 Phase Process





1. Identify the high-level scope, needs, goals and timeline
2. Conduct (verify) Feasibility Study
3. Build Capital Campaign Team
4. Write the Case for potential donor support
5. Finalize Capital Campaign fundraising goal and timeline
6. Design the overall Campaign Strategy and Budget
7. Prepare Support and Collateral Materials
8. Build the Communications Plan
9. Build Program Infrastructure (financial tracking, donor recognition, etc)
10. Early Formulation of Contingency Plan to Examine/Secure External Funding Options
11. Develop Gift Range Chart
12. Research / Screen Capital Campaign Advance Giving Prospects
13. Establish Campaign Policies

Build the Team

Preparation
1 - 3 Months



An orange circle with a white border and a subtle drop shadow, containing the text "Campaign 2 to 60 Months".

Campaign
2 to 60
Months

1. Launch and Manage Campaign
2. Conduct 3 Phase Capital Campaign
3. QUITE PHASE
 - 2 – 4 Months
 - Seeks larger/lead Advance Donor Commitments (50 - 60% of total)
4. TARGETED PHASE
 - 2 – 4 Months
 - Seeks mid-range Intermediate Donor Commitments (20 - 30% of total)
5. PUBLIC PHASE
 - Post Targeted Phase + up to 5 years depending on project
 - Seeks General Donor Commitments (20% of total)
6. Provide Excellence in Donor Response and Recognition



Follow-Up

1. Monitor / Receive Contributions from Pledges Made Over Time
2. Coordinate with Building Team to Monitor Construction Spend vs. Donation Fulfillments
3. On-Going Communication and Transparency of Reporting
4. Continuation of Active Public Phase over the life of the Program

Campaign “At a Glance”



How We Can Help

Advisor

Consultant

Manager



PARISH PLANNED GIVING

An Offering of the



GREEK ORTHODOX
ARCHDIOCESE OF AMERICA

Our Goal



PARISH
PLANNED GIVING

WHY

planned giving through a dedicated endowment is vital to the health and longevity of your parish

WHAT

keys will best position your success

HOW

we can help

*Planned Giving is the one-time offering of
the first fruits of our wealth.*



PARISH
PLANNED GIVING

Value of Planned Giving



PARISH
PLANNED GIVING

01

Reflect faith
and values

02

Expand giving
capacity

03

Agency over
assets

04

Secure tax
advantages for
heirs

Ways to Give



PARISH
PLANNED GIVING

Bequest

- Gift of assets through will
- 80% of planned gifts
- 45% know Executor designation

Beneficiary Designations

- Naming the parish
- Life Insurance policy
- Tax-deferred retirement assets (IRA/401K)

Gifts of Property

- Art, jewelry or other assets of perceived value
- GAP

Gifts of Appreciated Assets

- Stock, bonds
- Gains from inheritance
- Sale of a business

Gifts of Real Estate

- Income generating or asset to sell or develop
- GAP

Living Options



PARISH
PLANNED GIVING

Charitable Gift Annuity

- Gift creates an income stream for donor or beneficiary from gift that will remain with parish

Charitable Remainder Unitrust

- Irrevocable trust pays income based on annual asset value
- Parish received remainder

Charitable Lead Trust

- Trust pays parish income
- Remainder reverts heirs after set timeframe

IRA Rollover Distributions (QCD)

- After age 70.5, donors can donate their Required Minimum Distribution (RMD) to charity.
- Income tax savings

Appreciated Assets

- Variety of assets: stocks, bonds,
- Reduce capital gains

An endowment is a dedicated fund to steward planned and direct gifts for long-term security and short-term impact.

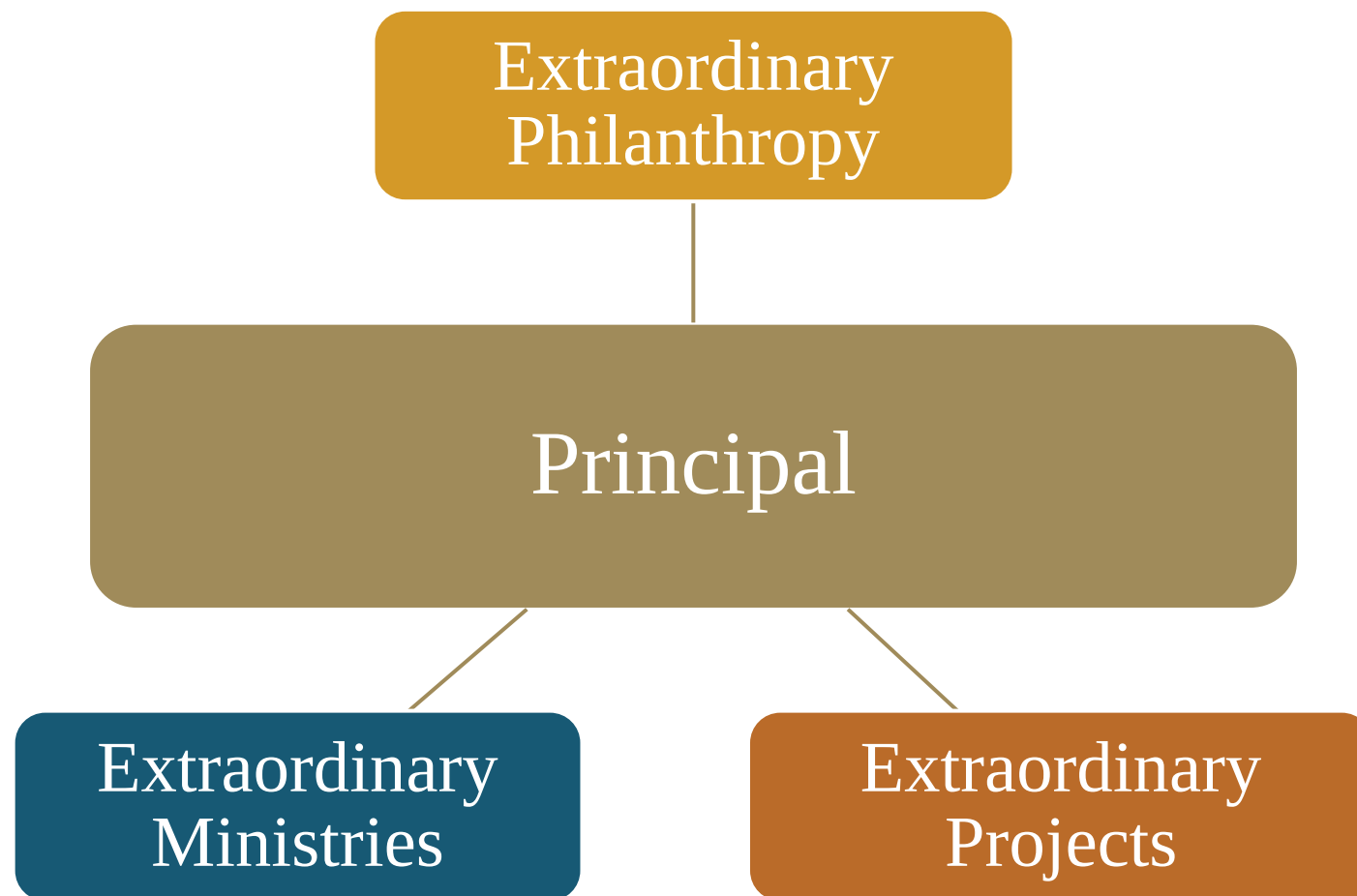


PARISH
PLANNED GIVING

Ordinary & Extraordinary



PARISH
PLANNED GIVING



Value of An Endowment



PARISH
PLANNED GIVING

01

Secure
Principal

02

Compound Gift
Value

03

Reflect Parish
Values

04

Preserve Donor
Intent

A Timely Opportunity



PARISH
PLANNED GIVING

\$84
Trillion
Generational
wealth transfer by
2045

46%
Percent of the
population has a
will

40%
Top Federal
Estate Tax Rate
(\$1M+)

6%
Percent of
population made
a planned gift

If you don't ask, someone else will!

Time & Trust



PARISH
PLANNED GIVING

40-45

Average age to
make an estate
plan (%)

15%

Percent of
planned gifts
made at that time

Prompt

Major Life Event:
Birth, Death,
Health

7 years

Average time for
a planned gift to
be realized

Why people don't give: lack of vision; lack of trust; lack of invitation

How our giving aligns . . .



Annual Stewardship

*First fruits from our
gifts of income*



Major Gifts

*Time-bound offering
to address specific needs*



Planned Giving

*One time offering of
the first fruits of our
wealth or gain*



*Together, we
fulfill our call
as Orthodox Christian
Stewards*

Annual Budget
*Supports the operations
of the parish*

Capital & Special Projects
*Funds facilities and
program improvements*

Endowment
*Provides for the long-
term security of the
parish while giving
back to the community*

A Comprehensive Campaign Example



Annual Stewardship
*10% increase for
campaign duration*



Capital & Special Projects
*Major Gift to Support
Campaign Capital Goals*



Endowment
*Planned Gift to the
Endowment*

One Invitation, Lasting Impact



WHAT will position you for success . . .



PARISH
PLANNED GIVING

Lessons Learned



PARISH
PLANNED GIVING

Vision

Set clear priorities
and directives for
giving

Leadership

Diverse talent and
succession
planning

Plan

Lay the right
foundation at the
beginning

Fit

Be true to your
parish in
execution

HOW we can help . . .

Accessible & Tailorable Resources for Every Parish



PARISH
PLANNED GIVING



Establish
Set Vision
& Governance



Advance
Raise Awareness
& Funds



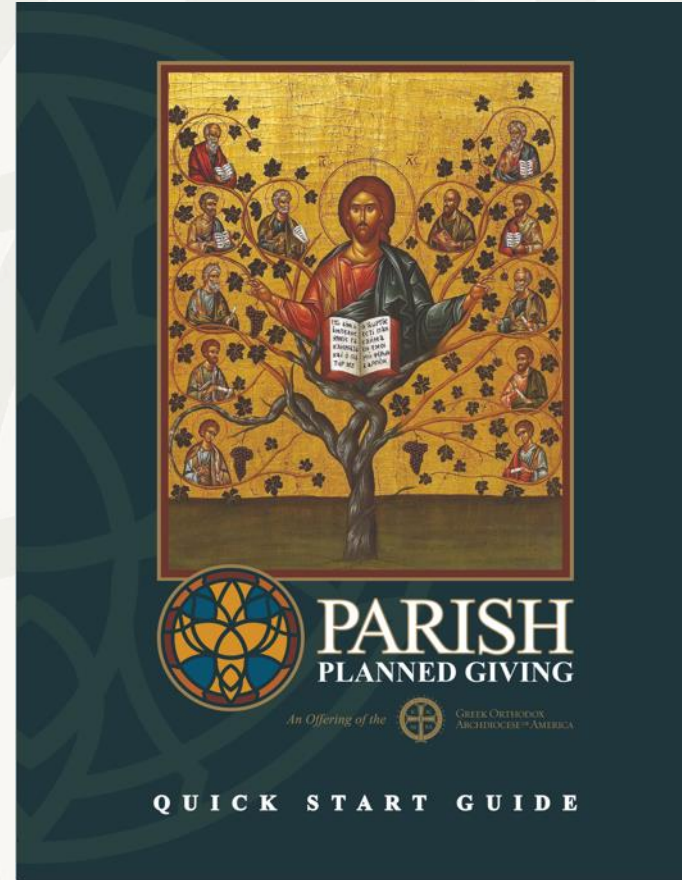
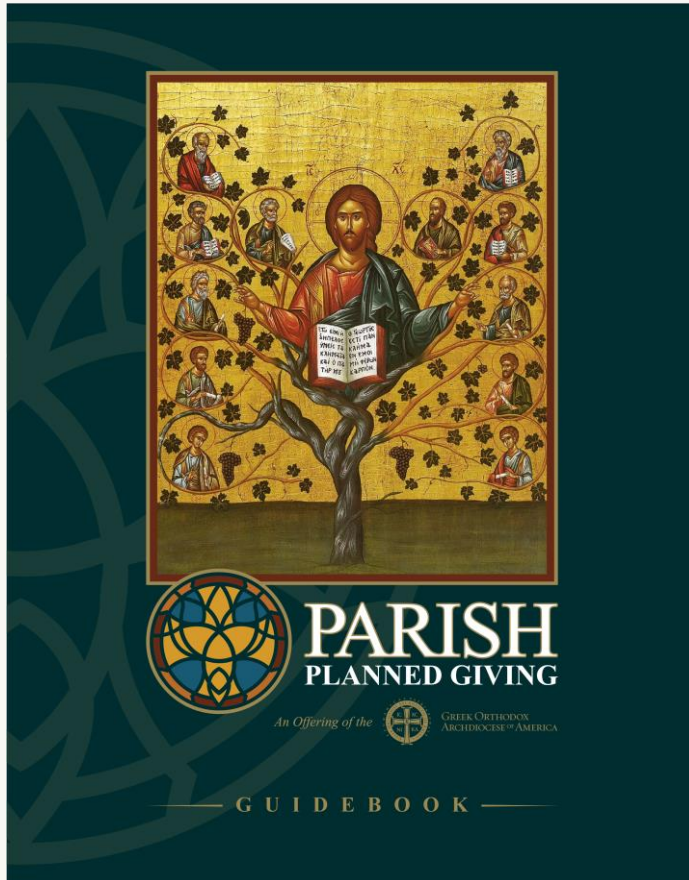
Flourish
Grow Gifts &
Grants

Guidebooks • Templates • Videos • Coaching

You will be enriched in every way by your great generosity.” II Corinthians 9:11



PARISH
PLANNED GIVING



<https://online.publuu.com/510207/1253497>



PARISH
PLANNED GIVING

Remember your parish in your estate plan.



PARISH
PLANNED GIVING



PARISH PLANNED GIVING

An Offering of the



GREEK ORTHODOX
ARCHDIOCESE OF AMERICA



Thank you.

Melpomeni N. Murdakes

Director, Parish Planned Giving

mmurdakes@goarch.org

goarch.org/PlannedGiving

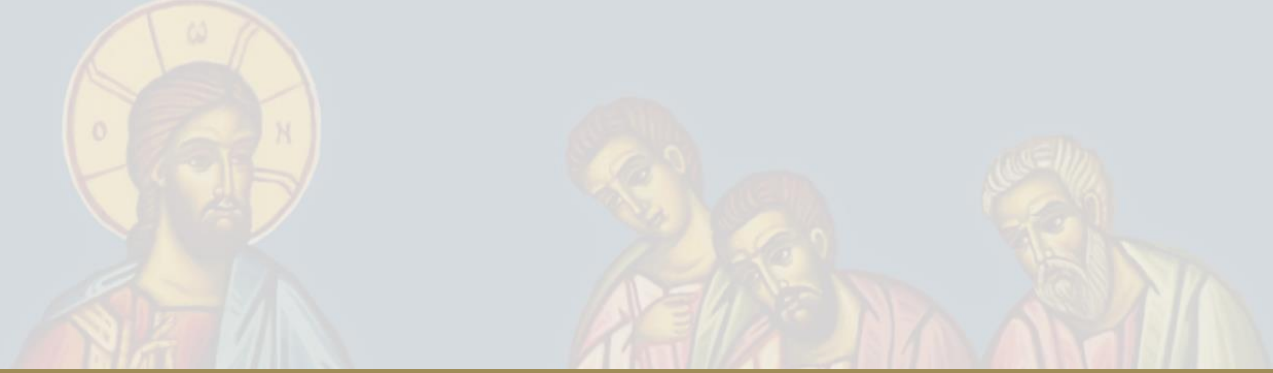


STEWARDSHIP & GENEROSITY

*You will be enriched in every way for your
great generosity...*

2 Corinthians 9:11

Our Goal



WHY

*an effective stewardship ministry will transform your parish
and the lives of your parishioners*

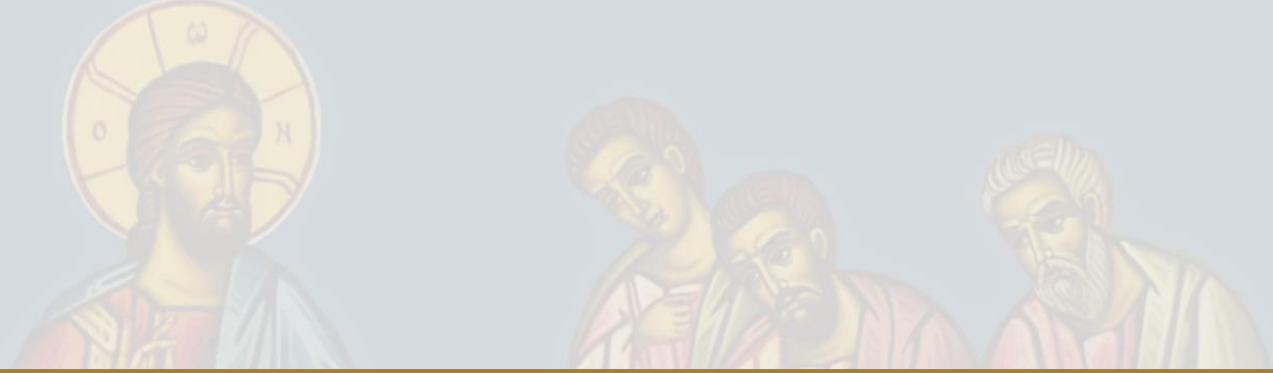
WHAT

elements will best position your stewardship ministry for success

HOW

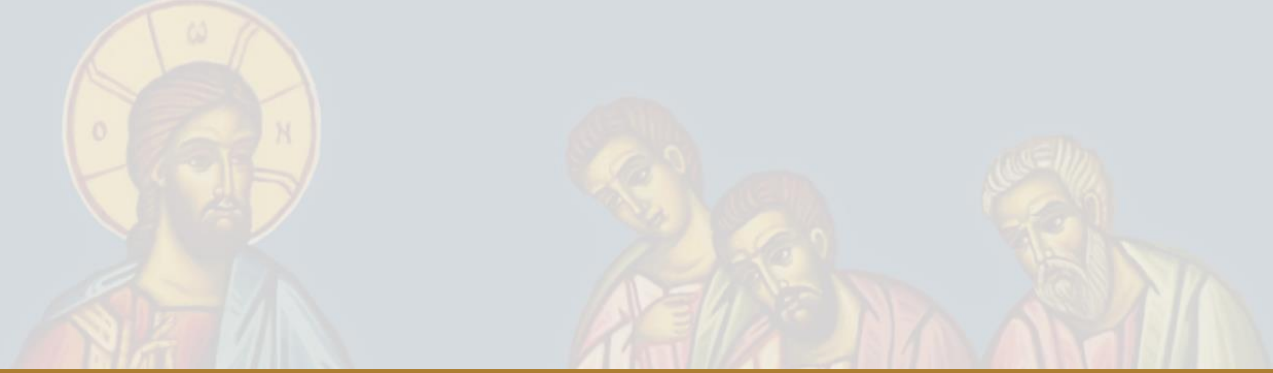
the Orthodox Parish Leadership Ministry can help

Transformational Spiritual Practices



We all need to
pray more, and
focus on our
spiritual lives!

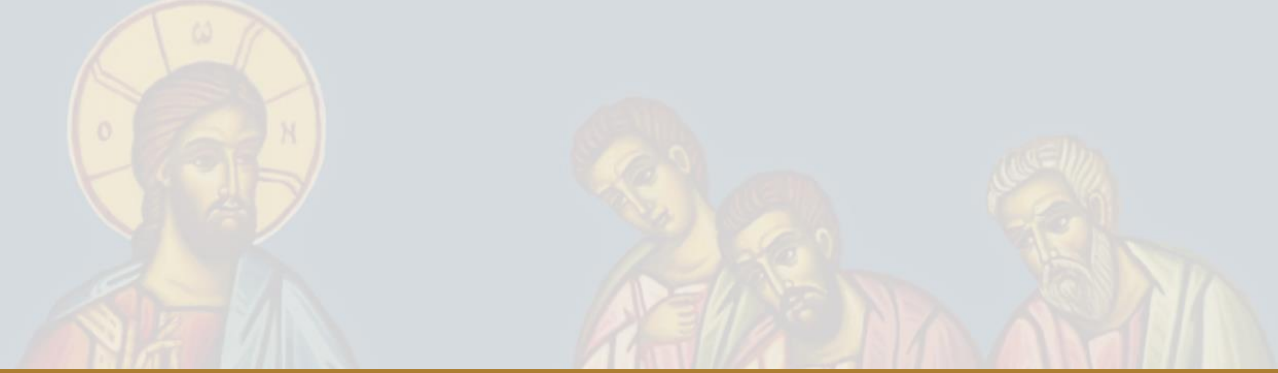
Transformational Spiritual Practices



We all need to
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We all need to
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be more
disciplined in
our lives!

Transformational Spiritual Practices

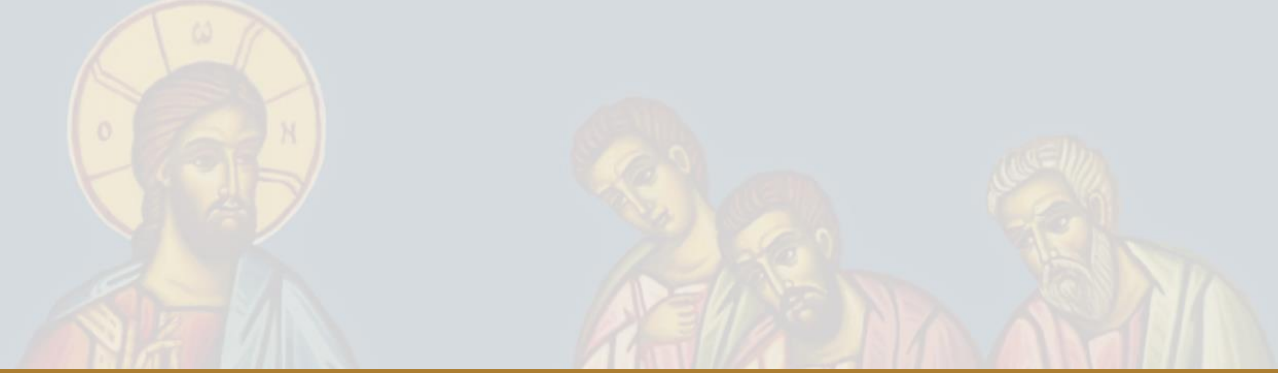


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We all need to
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We all need to
be more *loving*,
kinder, more
compassionate,
and more
forgiving to
everyone
around us!

Transformational Spiritual Practices



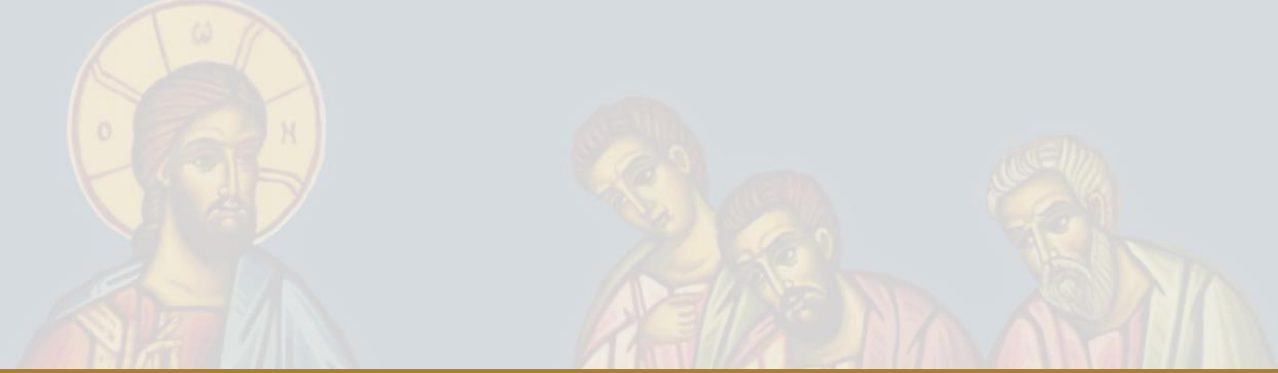
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We all need to
place *Jesus
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Transformational Spiritual Practices



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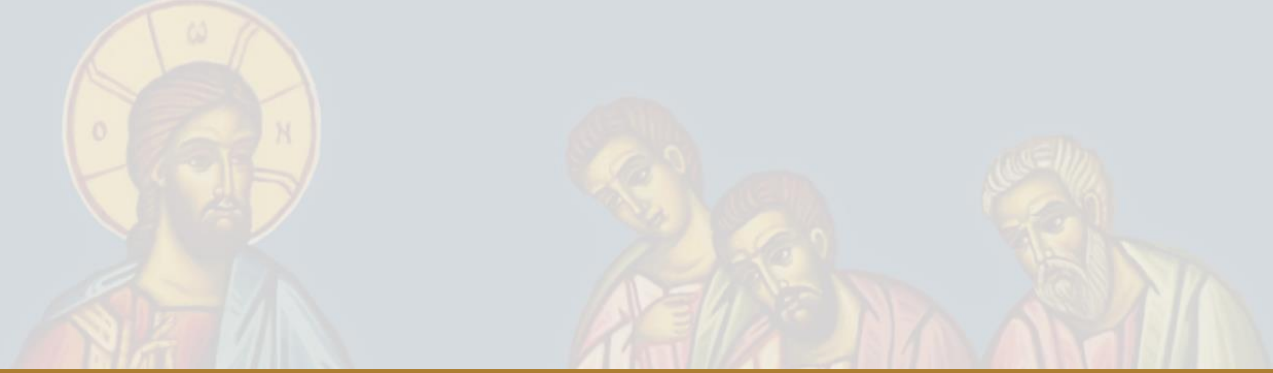
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else!

We all need to
give more
money to the
Church, to
those in need,
to charities that
reach out and
help others!

Transformation

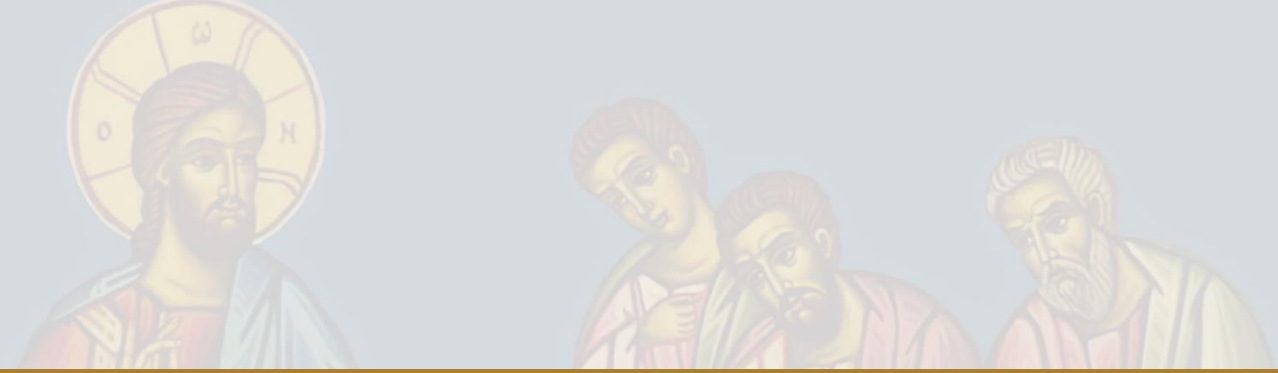


- ❖ Stewardship is a *spiritual practice* where we are called by God to return to Him the first fruits of our *time, talent and treasure*
- ❖ Giving is a response to *spiritual growth* and *spiritual engagement*
- ❖ *Generosity* is learned, it doesn't just happen
- ❖ When our parishioners and our parish embrace *giving first fruits*, our Church and its ministries will thrive as God intended

WHAT will position you for success . . .



Cultivate Generosity



15 Culture Practices of True Christian Stewardship*

Stewardship & Generosity

Leadership Alignment

Tithing

Time First

It's Personal

Engagement

Welcoming

Team

Thanking

Youth

Messaging

Campaigns

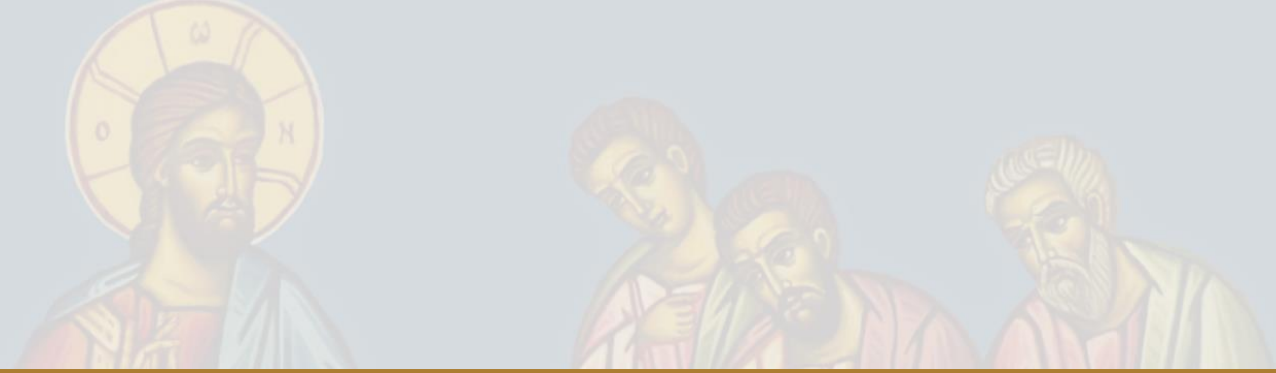
Planned Giving

Transparency & Accountability

Small Groups

*Source: Igniting the Flame of True Christian Stewardship by Bill Marianes

Build a Team



Stewardship Ministry Chair

Priest

Stewardship Campaign

Welcome Ministry

Small Groups

Communications

Youth Stewardship

Ambassador Ministry

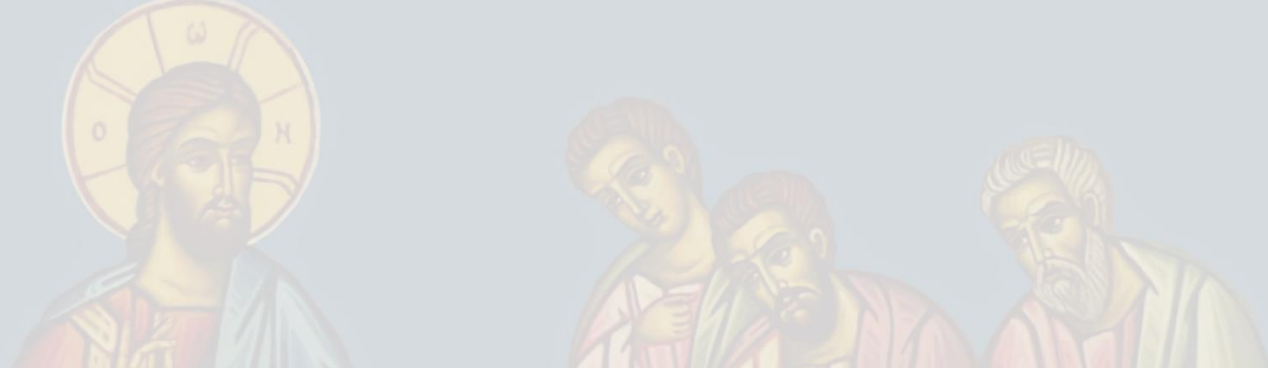
Planned Giving Ministry

Stewardship Data

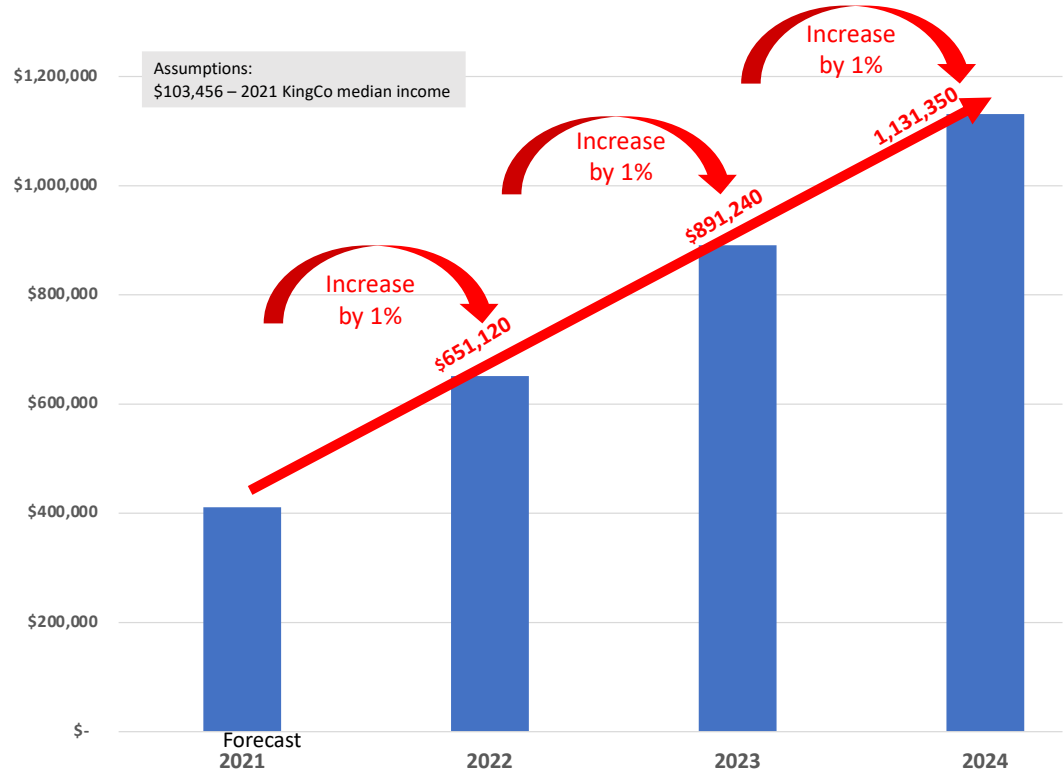
Thanking

*A successful
Stewardship Ministry Team
meets and communicates
with the parish every month.*

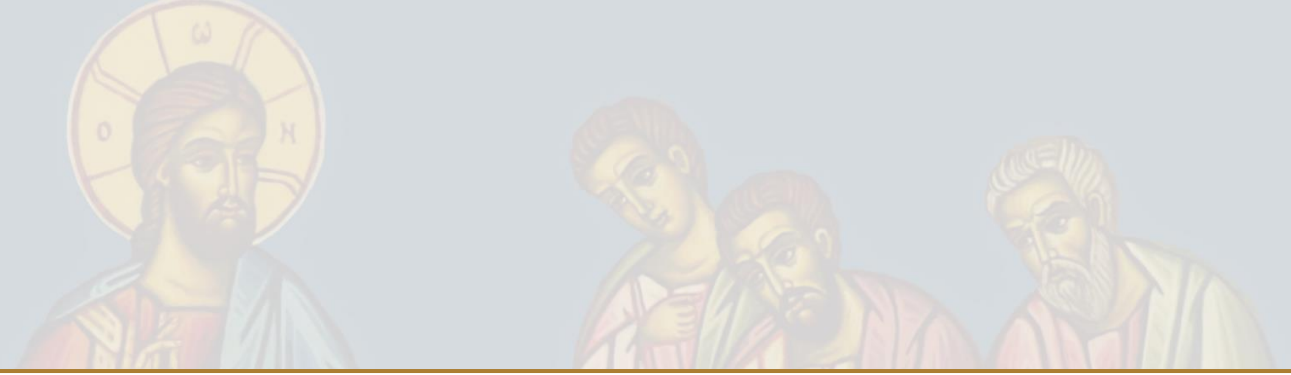
Begin Journey to Tithing



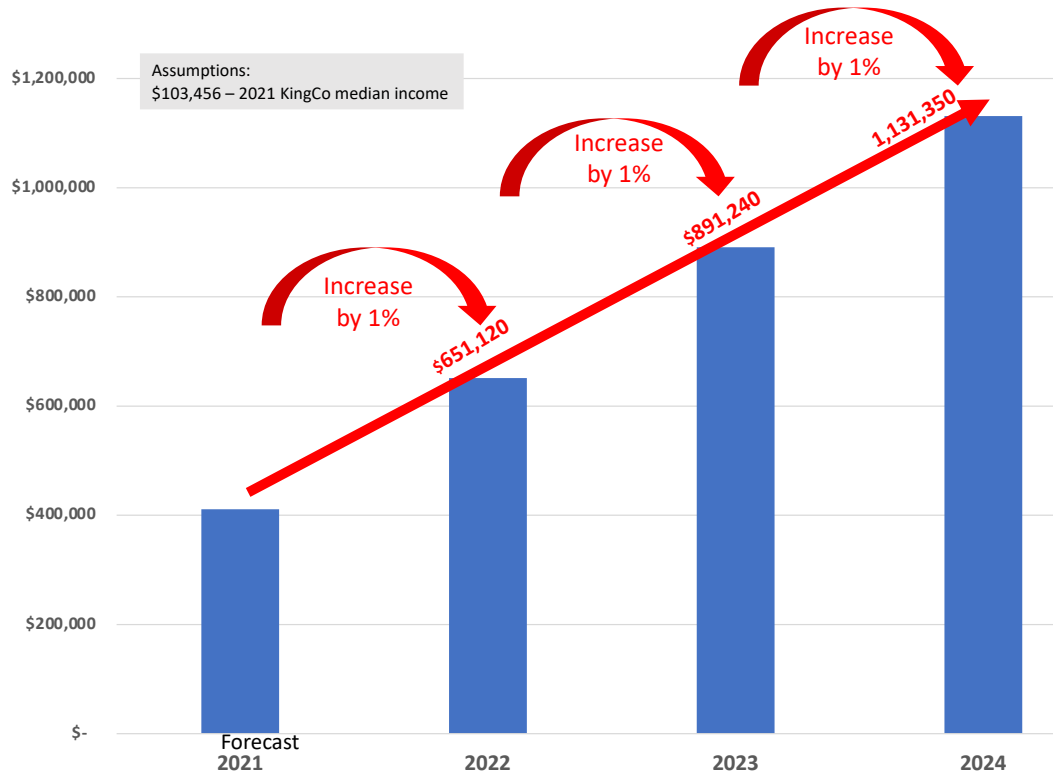
Revenue Impact of Increasing Stewardship by 1% of Income Year After Year on our Path Towards Tithing



Begin Journey to Tithing



Revenue Impact of Increasing Stewardship by 1% of Income Year After Year on our Path Towards Tithing



Step 1:

Determine what % of income you are giving to the church

Step 2:

Round up to the next WHOLE % of your income and begin giving the higher amount

Step 3:

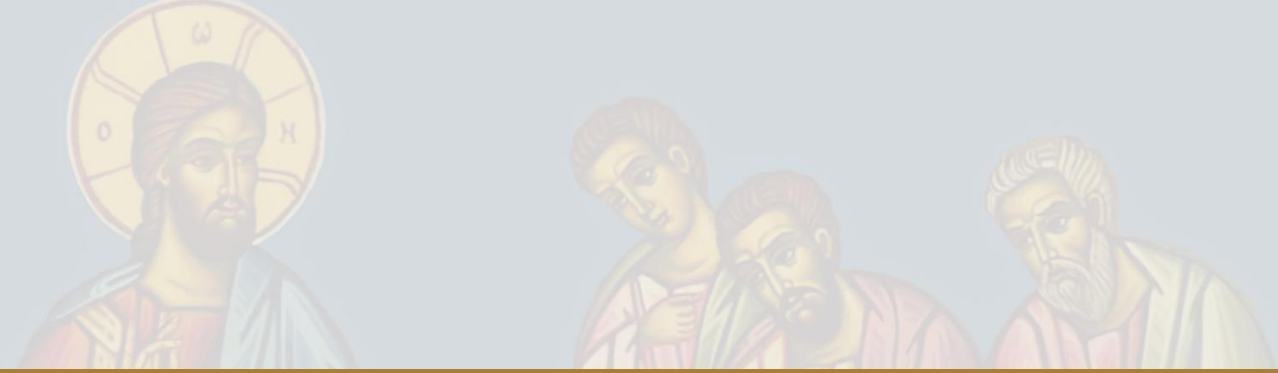
Invite everyone in your parish to “round up” as well

Step 4:

Next year, round up another 1% and invite everyone else to do the same.

Continue until you are tithing at least 10% of your income.

Messaging



Which One is Your Parish?

We give to keep the lights on

Money is scarce

We have to pay the bills if we are to survive

Internally focused

You must do your fair share

Stewardship is about raising money

We give to fulfill our mission

We may not be rich, but we have more than enough

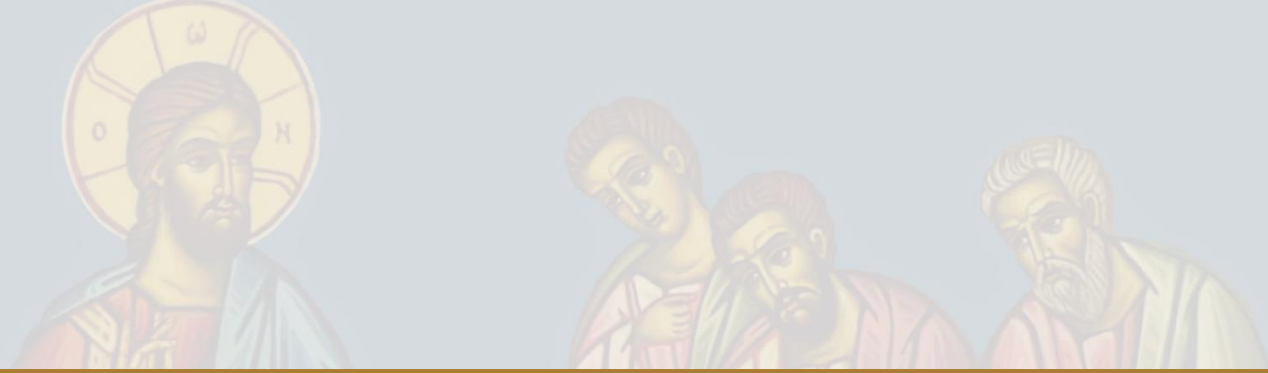
We can dare to dream and grow in faith

Externally/globally focused

Partner and grow in faith with us

Stewardship is about nurturing generosity and
transforming lives

Messaging



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Messaging

All of this was possible through your generosity.

1 Beautifully Revamped
Bookstore

Invested
\$4,000 in



to support the
ministries of the
Metropolis of
San Francisco

2 Psalter
Groups

8
Eight
Dates

1 New Logo

ASSUMPTION
GREEK ORTHODOX CHURCH
SEATTLE • WA

8 Parishioners offering time
& talent in the revitalized
Welcome
Ministry

Catechumens
8 Baptisms
4 Weddings
12 Funerals

250 PALM
CROSSES
180 RED
EGGS

1 Clergy
Appreciation
Luncheon
where Fr Dean
was gifted



2 New Sets Of
Vestments

1 Facility
Maintenance
Plan

300+

Christmas Hygiene Gift
Bags for Homeless
Women at
ANGELINE'S DAY
CENTER

8 Myrrh
Bearers

1 Bite of Greece
Marketing Intern 

\$7,500



Because of you...THANK YOU!

200 Meals
every month
COOKING
FOR THE
HOMELESS
2,400
meals per year

17 Church
Tours
With over
170
Participants

1 Dormition of
the Theotokos
Endowment

246

WORSHIP SERVICES
Time & Talents From:
Chanters
Acolytes
Readers
Ushers
Greeters
Attendees

\$12,000

For O.C.M.C. missionaries Jesse and Juanita Brandow
to help grow the Church in Central America

\$1,000 to support
Hellenic College
HOLY CROSS
Greek Orthodox School of Theology

1 Youth &
Family
Ministry
Director

1 Parish
Council
Training

\$9,200
Donated to



provided
1,314
children with
weekend hunger
bags

\$1,000 to support
DIGITAL CHANT STAND
OF THE GREEK ORTHODOX ARCHDIOCESE OF AMERICA

Over
1,800
joyful volunteer hours
the week of the Bite

7
Small
Groups

Christmas for a
family of
7
gifted through the
Advent giving tree

*“Fundraising is precisely the
opposite of begging. Rather, we are
declaring, “We have a vision that is
amazing and exciting”*

-Henri Nouwen

Messaging

Our Journey to Tithing

There is this great Greek saying, "It takes a village to raise a family." Through my own experience I would say it slightly differently. I would say, "It takes a community to encourage growth in our Orthodox Christian faith." I believe this is true in all matters of faith, to include Stewardship, which is an expression of our faith.

Thinking back about my years growing up, I learned a lot from my parents regarding stewardship. As I've shared with you in my sermons, I learned the importance of weekly giving from my dad. I have clear memories of my dad writing his check on every Sunday morning as part of his Church preparation routine. With satisfaction, I witnessed him offering his financial gift weekly as the tray was being passed. In retrospect, my dad offered his gift with joy as part of his experience of worship. I also worked side by side with my dad at the St. Demetrios festival for multiple years, working with him counting tokens and being a runner, collecting tokens every few hours! My dad taught Sunday School, served on the Parish Council, and together with my mother, sang in the choir for years! Yes, my parents taught me a lot about what it meant to be a steward of time, talents, and treasures. They taught me a lot and laid a great foundation for me. As a result, when I became an adult, I was quick to become a steward, offering my financial gift, teaching Sunday school, serving in the altar and organizing youth retreats. I have many great and joyful memories!

As with everything else, nothing is perfect. There are some things they didn't teach me. I began to realize I still had growing to do when we started fundraising for our building project in 2010. As you may be aware, Clara Nicon, of blessed memory, gifted her home to our building project which allowed the parish to pay off a \$1.5 million-dollar line of credit in five years!! I'll never forget the conversation I had with her as she offered her home to the parish and our project. As she was signing the paperwork, gifting the property to the Church, she looked at me right in the eye and said, "If people only knew how good it feels to give." Her comment stuck with me and remained with me! I still think about that conversation even today. In essence, her comment invited me to ask the question, am I giving until it feels good, or I am giving out of obligation not really thinking about the gifts that I'm offering.

At about the same time, a good family friend, who is not an Orthodox Christian, was offering ten percent of her income to her Church. While Presbyteria Valerie and I were having breakfast with her one morning, she shared with us a story about how God has taken care of her in her spiritual journey of tithing. I don't remember the details of the story, exactly, but what stuck with me was the fact that our Lord always provided for her and how strong she was in her faith in Christ. This strength manifested itself in her life years later when she had a brain stem stroke which changed her life forever. To this very day, our good friend Barbara (or auntie Barbara as the kids call her) is as faithful, and perhaps more faithful, then she was when she shared with us her tithing story.

Adversity has a way of leading faithful people to spiritual growth.

I am still so very thankful for those who were excellent, Christ centered and Orthodox Christian witnesses in my life. Throughout the years, multiple seeds were planted by those witnesses.

Fast forward now to 2020 and the COVID pandemic. Through the effects of the pandemic, realizing our parish needed to be more resilient in our stewardship of treasures, I, together with our parish leadership, decided to move toward a tithing model. Moving toward a tithing model was not an arbitrary decision. Our Uniform Parish Regulations invites us to tithe. In addition, our spiritual shepherd and hierarch, Metropolitan Gerasimos, working with Bill Marianes, implemented a tithing model that he is inviting the parishes in our Metropolis to adopt. In walking this journey the question was asked, if we as a parish had all the money in the world, what would ministry look like for the Church of the Assumption? Asking this question gave me a whole new, and exciting, perspective on the possibilities for ministry that this new model could offer.



As a leader in our parish, in deciding to move toward a tithing model, I had to make a conscious decision to participate, to lead by example, to grow in becoming a tithing steward. You must understand, this is something I have never done before. Our giving was offered from "what was left over." Ten percent seemed like such a big number! Quite frankly, it was a fearful step to take! My family has so many needs, shouldn't those be first? These were my thoughts as I was struggling with my decision. As always, fear does a good job of paralyzing decisions!

I'll always remember the day I made a conscious decision to move forward. It was a Sunday during Liturgy, when the words of our Lord in that Sunday's Gospel reading resonated in my heart, "Seek first the kingdom of God, and all these things shall be added unto you." (St. Matthew 6:33 KJV) I knew at that instant that our Lord was inviting me to walk this journey as an expression of love, faith, and trust in Him.

Presbyteria Valerie and I are walking the tithing journey. Now our giving is not from what is left over, but we give first from what we are blessed to have. Hence, we have significantly increased our giving and are currently giving four times more than we use to! Through our journey, yes, our Lord has taken care of us and given us more than we need! We are still walking toward that ten percent and look forward to our continued journey!

I feel so very blessed to have had the example of my father and faithful friends to include our beloved Clara. "It takes a community to encourage growth in our Orthodox Christian faith" and these beautiful examples in my life have helped me grow in mine. Their examples planted seeds in my heart inviting me to grow in my love and faith in Christ and have helped me to come to experience the joy of giving.

"Fundraising is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission."

-Henri Nouwen

Dear Assumption Stewards,

Thank you



Kihel Gymnasium where members of the Maui Mission have used donations to prepare and deliver care packages to victims.

for embracing our journey of **percent giving** through which we endeavor to become a **tithing community**!! As we grow in this journey, your ever-increasing **generosity** enables the Parish to do more and more good works for the Lord.

Just this month, **YOUR** generosity enabled Assumption to donate

\$2,000

to support the victims of the **devastating fires on Maui**.

We look forward to being able to do even more to support other needful causes both inside and outside our parish!! The Lord has blessed us with a loving and committed community. Tithing, in conjunction with our Strategic Plan, will allow us to fulfill God's vision as we help one another, and those around us, to **grow in faith and love through Christ!!**



Circled at the bottom of the photo is the former location of a store in Lahaina that was lost in the fire. The store's owners are members of the Maui Greek Orthodox Mission.

Did you know, 20% of our Stewards who pledged in 2022 have not filled out a pledge card for 2023.

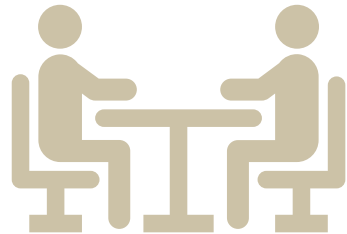
Want to join us in spreading God's love?

There is still time to fill out a 2023 **Stewardship Pledge Form**!!

It's Personal

Implement *Ambassador Ministry* to Connect
with EVERY Family At Least Once Per Year

Include Ministry Info with Stewardship Materials



DIRECTORY OF MINISTRIES

FELLOWSHIP MINISTRY

Sunday Fellowship Coffee Hour Ministry

Coordinate providing coffee and a light snack following church services to help us get to know one another, and help clean up after coffee hour has ended.

Sophia Foote ☎ (206) 334-8049 ✉ sophiafoote@comcast.net

Men's Fellowship Ministry

To provide the men of our community opportunities for spiritual development and fellowship.

Andrew Manolides ☎ (206) 235-7135 ✉ amanolides0815@gmail.com

Small Groups Ministry*

Provide our parishioners with new opportunities for spiritual development, outreach, fellowship and parish support in a small group setting.

Laurie Skandalis ☎ (206) 941-3805 ✉ laurieskandalis@yahoo.com

YAL (Young Adult League)

To provide single adults, between 18 and 35 years of age, opportunities for fellowship, service, witness and worship.

Instagram: [@yalseattle](https://www.instagram.com/yalseattle) ☎ Email: yalseattle@gmail.com

OUTREACH MINISTRY

Welcome Ministry*

Provides Christian hospitality to help guests feel at home in our parish.

Penny Peppes ☎ (425) 503-3421 ✉ ellinas1@msn.com

Bookstore Ministry*

To encourage and enhance the Orthodox experience in our parish by offering items that aid in the development and awareness of our faith: books, icons, cards, and items for the home altar.

Sophia Schier-Hanson ☎ (210) 557-8528 ✉ sschierh@gmail.com

Bite of Greece Festival Ministry*

The annual celebration of our faith and heritage and our largest community outreach ministry of the year.

Kristina Mehas ☎ (206) 390-7233 ✉ kmmehas@gmail.com

Society of St. John the Almsgiver Ministry

On the first two Thursdays of each month, this group prepares and serves dinner for homeless men aged 55+ at the Seattle St. Martin de Porres shelter.

Laurie Skandalis ☎ (206) 941-3805 ✉ laurieskandalis@yahoo.com

THESE MINISTRIES ARE INCLUDED IN OUR STRATEGIC PLAN

HOW we can help. . .



Well done
good & faithful
servant

Matthew 25:23



STEWARDSHIP
MINISTRY

Samples ❖ Videos ❖ Coaching

OPL web site coming soon.....

<https://www.goarch.org/it/departments/stewardship>

<https://stewardshipcalling.com>

THANK YOU

Kristina Mehas

Stewardship Lead, Orthodox Parish Leadership Ministry

Greek Orthodox Metropolis of San Francisco

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